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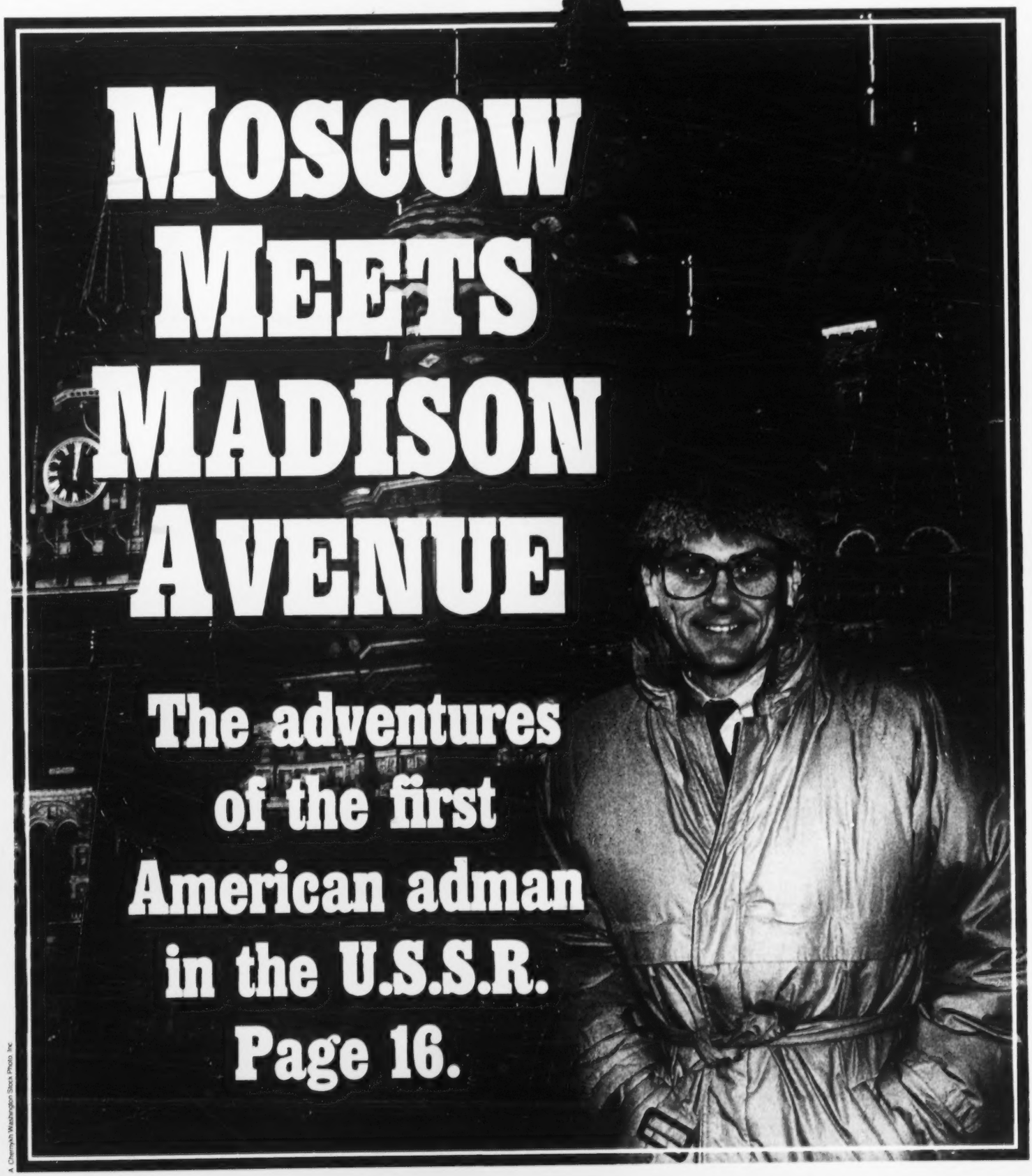

MOSCOW MEETS MADISON AVENUE

The adventures of the first American adman in the U.S.S.R.

Page 16.

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Once she burned her bra...

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NEWS SUMMARY

■ **ConAgra** has begun a hard-hitting $50 million ad campaign for its Healthy Choice frozen foods. 1

■ **Unilever** will begin a commission-plus-incentive compensation system for its ad agencies worldwide in January. 1

■ **McCann-Erickson** dropped Rona Pashkin-Boyer as manager of its Los Angeles office; in the past 12 months, all four women who headed southern California offices of major agencies have left their jobs. 1

■ **Pepsi-Cola Co.** promoted two executives to marketing and new-product development posts as part of a restructuring at the company. 3

■ **Miller Brewing** named as president Jack McDonough, formerly a top executive at rival Anheuser-Busch. 3

■ **Outdoor Advertising** Association of America named Carmichael Lynch to promote the ad medium. 3

■ **'The New Yorker,'** now under the leadership of Tina Brown, will phase out advertorials. 3

■ **Colgate-Palmolive's** growth plan is on target, says Chief Operating Officer William S. Shanahan. 4

■ **'Reader's Digest'** signed a global advertising deal with Ford Motor Co. and expects to sign other advertisers. 12

■ **Newspaper** foldings are expected to increase as joint operating agreements expire. 32

■ **Home Depot** named Richard Sullivan as ad VP. 36

■ **Borland International** is offering a two-for-one software deal in ads designed to compete with Windows. 44

■ **Thomson Consumer Electronics** says it will spend $9 million this fall backing RCA TVs. 44

■ **Chevrolet's** new advertising keeps its "Heartbeat of America" positioning but drops the music. 45

■ **Bill Clinton** last week got the backing of some big names in the advertising world, including Jerry Della Femina. 48

■ **Chesebrough-Pond's** will extend the Pond's name to a line of moisturizers with a $30 million launch next year. 49

■ **Steve Burrows** was named exec VP-marketing for Anheuser-Busch International, and August Busch IV becomes VP-Budweiser brands. 52

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ABP MPA ABC

'Reader's Digest' inks global Ford, GM deals

By Scott Donaton

Reader's Digest signed a global advertising deal with Ford Motor Co. just days after inking a similar agreement with General Motors Corp.

The deals come as the monthly, published by Reader's Digest Association, steps up its global ad sales efforts. Gregory Coleman, U.S. publisher of *Reader's Digest*, said 10 more global deals could be announced in the next month.

The Ford deal's size couldn't be determined but is believed to be bigger than the estimated $15 million GM program. Both pacts allow the automakers to earn discounts and develop marketing programs involving any of *Reader's Digest's* 41 editions worldwide, with a total circulation of 28 million.

"What has been worked out are [agreements] to work together around the world," Mr. Coleman said. "Our ability to be truly global and to make centralized decisions has created a great deal of excitement in the ad community."

He said *Reader's Digest* is in serious discussions with marketers in the food, travel, import automotive and package-goods areas about similar global deals and has met recently with marketers including Procter & Gamble Co., Warner-Lambert Co. and Bristol-Myers Squibb Co.

To make marketers aware of *Reader's Digest's* global capabilities, Mr. Coleman has delivered oversize media kits, containing copies of various local-language editions and a cassette player with a customized, prerecorded message, to about a dozen key clients.

The GM deal was worked out directly between the magazine and the automaker, without the involvement of any GM ad agencies. The Ford deal, conversely, was spearheaded by J. Walter Thompson USA, Detroit.

Alan Gottesman, a media analyst with PaineWebber, said *Reader's Digest* has a strength outside the U.S. that few other publishing companies can match.

"It's the kind of thing that really only *Reader's Digest* can do," he said. "There's no other single magazine that has that kind of penetration in as many markets."

Hachette has signed global ad deals with a number of marketers, including GM and Ford. But those deals involve various Hachette media properties instead of focusing on one title.

The global ad deals will involve elements other than ad pages in *Reader's Digest*, Mr. Coleman said. In GM's case, he said, the association might publish a guide to the 1994 World Cup soccer championship, which GM is sponsoring. □

Mother Gert Boyle will start appearing in magazine ads and in TV spots in the U.S. and Europe for Columbia Sportwear.

Sportswear's stern matriarch heads for Europe

By Marcy Magiera

Meet Mother Gert Boyle, chairman and no-nonsense spokeswoman for Columbia Sportswear Co., a marketer of outdoor clothing.

She once put her son Tim, Columbia's president, through a carwash to demonstrate the waterproof properties of the company's outerwear.

This fall, she's up to new tricks.

Columbia in October will introduce the irascible Mother Boyle to Europeans with its first print, outdoor and cable TV advertising campaign overseas. At the same time, Columbia is broadening its U.S. marketing effort to include broadcast TV and mainstream magazines. U.S. media spending will be $2 million to $3 million.

In Columbia's first foray into general interest magazines like *Life*, *Sports Illustrated* and *Rolling Stone*, Mr. Boyle attests that his mother "snaps necks and hacks off arms" to ensure Columbia's garments meet her strict standards for design and construction.

The mother-son team will also appear in a new TV spot for Columbia, in which the two discuss Mr. Boyle's rain-drenched experiences growing up in Portland, Ore. It will run during NBC's late-night programming and the syndicated *The Arsenio Hall Show*, as well as on cable services ESPN and MTV: Music Television.

Columbia will rotate the new spot with the 2-year-old commercial in which Mother Boyle makes her son go through a carwash.

Columbia's claim to fame is the Interchange System jacket, made up of a warm lining and waterproof outer shell that can be worn separately or zipped together.

The jacket, its signature ski product, helped boost Columbia's sales to $130 million in 1991. That's a 591% increase from 1986, the first year the company marketed skiwear.

Before 1986, 54-year-old Columbia was known for its hunting and fishing togs, which it continues to market.

Columbia is betting its offbeat brand of humor will travel well to Europe.

"The mother-son relationship is universally understood," said Mike Smith, account manager at Columbia's agency, Borders, Perrin & Norrander, Portland, Ore.

The ads will run in the U.K. and will be translated to run in the other European countries where the Columbia brand is sold: Italy, Switzerland, Spain and Denmark.

The company's overseas expansion plan, which began in 1988, includes moving into Greece, Germany, France and Mexico next year.

To oversee its expansion, Columbia this month named Russ Lucas to the new post of director of international marketing. Mr. Lucas previously was president of Columbia competitor Patagonia International and before that served as director of international business development and international counsel for Nike. □

Just mention it—please

Consultancy tracks brands included in news stories

By Gary Levin

McDonald's beats Burger King, and Nike beats Reebok. But in the mass-media consciousness, No. 2 Colgate beats top-selling Crest.

That's the finding of the Delahaye Group, a marketing and public relations consultancy in Hampton Falls, N.H., that uses the Nexis data retrieval system to measure the number of mentions received by a variety of brand names in newspapers and magazines.

During the three-month period of May 1 to July 31, for instance, Burger King Corp. was outmentioned by the larger McDonald's Corp. 2,895 to 1,296.

And, as is true at the cash register, Nike won out over Reebok International, with 3,091 mentions to Reebok's 2,357. (Reebok's Olympic endorser duo also fared differently. Dave Johnson got 1,206 mentions, but Dan O'Brien, who failed to qualify for the Games, got 919).

Colgate, however, won out over Procter & Gamble Co.'s Crest, 654 to 300, perhaps because the toothpaste brand's name is part of its parent company's, Colgate-Palmolive Co.

Delahaye, which has tracked this name-dropping in the press for nearly two years, doesn't pretend the comparisons have much practical use. For starters, the company doesn't know whether the mentions are positive, negative or neutral.

"It started from our own personal curiosity," said President Katharine Delahaye Paine. "Instead of brand names, we were using concepts, like war vs. peace." Then the company tracked coverage of Democratic presidential primary candidates.

But increased competition among several top brands led to a shift in emphasis that Delahaye is now trying to leverage for new-business activity.

So far, the tool has helped the consultancy win business from IBM Corp.'s software division and other high-tech companies, Ms. Paine said.

"It's a marketing tool in the sense that for somebody who doesn't know it's time to wake up and smell the coffee, this is how your competition is being treated in the press," Ms. Paine said.

"I wouldn't call it a strategic marketing tool," she said. "It's a piece of information." □

Brand news

Number of mentions a brand received in newspapers and magazines from May 1 to July 31, 1992.

Cheerios	247	Chiquita	348
Frosted Flakes	54	Dole	229
McDonald's	2,895	Nike	3,091
Burger King	1,296	Reebok	2,357
Hallmark	324	Dave Johnson	1,206
American Greetings	150	Dan O'Brien	919
Toyota	10,638	AT&T	11,603
Nissan	8,136	MCI	3,185
Lexus	1,236	Sprint	1,738
Infiniti	1,037	Bush	40,192
Colgate	654	Perot	18,164
Crest	300	Clinton	36,296

Source: Delahaye Group

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BRIEFS

NEW YORK—McCaffery & Ratner recently picked up $4.8 million in account and project wins.

The agency succeeds Weiss, Whitten, Carroll, Stagliano on the WQXR-AM and FM business. The Philharmonia Virtuosi account moved to McCaffery from in-house, and the agency picked up a special project from the Italian Trade Commission. McCaffery has also been named agency for Jean Patou, a perfume marketer.

Other account moves

- **Southwick Clothing**, Boston, to **Suissa Miller**, Santa Monica, Calif., from in-house for its $2 million account.
- **Viva International Group**, Fairfield, N.J., to **Griffin Bacal**, New York, from Graf Bertel Dominique for the estimated $1.5 million eyewear account.
- **A&S Plaza**, New York, to **Dweck & Campbell** from McCaffrey & McCall for the mall's $1.5 million account.
- **First Colony Coffee & Tea Co.**, Norfolk, Va., to **Earle Palmer Brown Cos.**, Richmond, from Finnegan & Agee for its $1 million-plus account.
- **Ing. Loro Piana & C. S.P.A.**, New York, to **Geer, DuBois**, first agency for the weaver's $1 million U.S. account.
- **Miltons**, Boston, to **Pagano, Schenck & Kay**, Providence, R.I., from in-house for the retailer's $1 million account.
- **Taesa Airlines**, Mexico City, to the **Alden Group**, New York, first agency for an image campaign. □

Advertising Age International

September 28, 1992

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Fellini: Why he did Italian ads. **Page I-3.**

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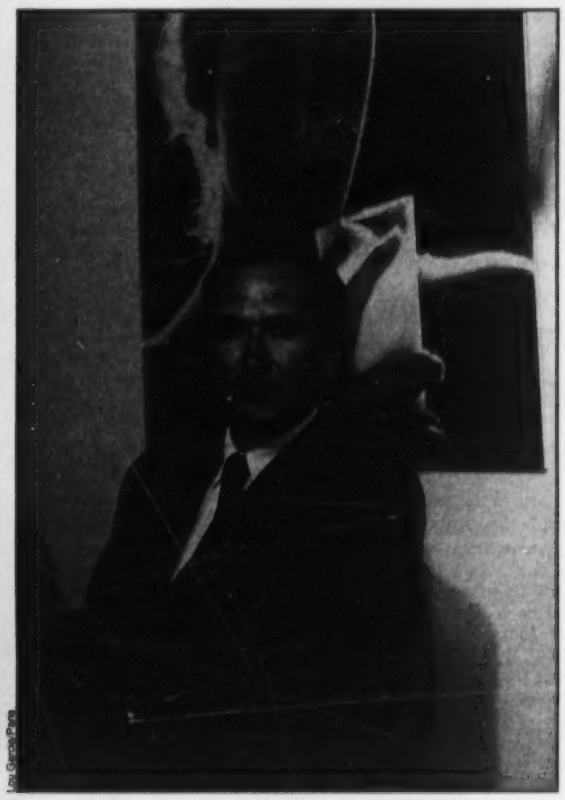


Jean-Paul Agon is reinvigorating L'Oreal's Biotherm line.

How L'Oreal plans to get Biotherm line back on track

Agon refocuses skincare line's support on natural qualities

By Laurel Wentz

PARIS—L'Oreal is putting the finishing touches on a three-year program to lift its Biotherm skincare line.

The brand was introduced in the 1960s, peaked in the mid-1980s, and then sales growth slowed because of poor advertising and distribution.

But L'Oreal, perhaps the most pure global marketer in the world, doesn't like to give up on brands it thinks have potential. And Biotherm illustrates how much time and patience the company is willing to give a brand.

Jean-Paul Agon, the dynamic young general manager of the Biotherm business, came on board three years ago after running other L'Oreal companies in France and Greece. His task was to head up the rescue effort, which will publicly unfold this month with a $15 million international ad campaign. In a few months, the line's outer packaging will be changed.

Eventually, Biotherm—now sold in Europe, the U.S. and Canada—will be expanded to Latin America and Asia. Like other L'Oreal lines, Biotherm will have the same agency, ad campaign, packaging and positioning everywhere in the world. Groupe FCA handles.

"When [a brand] works somewhere, it will work everywhere," Mr. Agon, 36, said. "Every launch is a demonstration of this principle."

Biotherm's sales were about $200 million when Mr. Agon was brought in. That was up from about $14 million in

(Continued on Page I-30)

New French law would hobble Carat

By Bruce Crumley

PARIS—The French Parliament next month will consider a law that could mean the end of the dominance of Carat, Europe's biggest media buying group.

It could also spell the end of the current agency commission system.

The bill, drawn up as a business anti-corruption measure, strikes at the heart of the unique French media buying system Carat invented and has been trying to export around Europe.

At the very least, advertisers expect to end up paying less for media because the system that encourages inflated rates will no longer exist if the proposed law passes.

The government wants to strike down media groups' practice of buying media in bulk and reselling it to advertisers. Advertisers aren't told how much the media they buy actually costs or how much of the discount is passed on to them. The practice of negotiating rates, with discounts based on huge volumes, renders rate cards meaningless.

The system is riddled with unofficial discounts, such as the notorious surcommission, a volume rebate media owners slip to media buyers.

The French government wants to standardize media buying, requiring

(Continued on Page I-30)

Worldwide ad spending won't rebound in '92

Latin America, Asia provide some bright spots amid gloom

By Julie Skur Hill

The long awaited return to double-digit growth in ad spending worldwide is not coming this year.

Many soothsayers predict the 1992 figures in several of the world's major markets won't even match those of 1991, when the Persian Gulf War disrupted ad spending, according to an *Advertising Age International* survey. Maturing markets and the recession are cited as factors.

Latin American nations and smaller Asian countries are bright spots, but total ad spending in these countries is so low it can't offset troubles elsewhere. All figures, except those indicated, are in real terms. The estimates are done in local currencies. The effects of this month's drastic currency fluctuations in Europe are unknown.

Saatchi & Saatchi Co.'s Zenith Media Worldwide, London, picks Colombia and Venezuela for the most growth this year, leaping 28.3% and 17.7%. France, Spain and Japan once could be relied on for healthy growth, but Zenith has downgraded its forecasts, excluding inflation, for all three.

"The much-predicted recovery on a global basis has not materialized and shows no signs of coming any time soon," said Steve Winram, Zenith media research and information director.

Zenith predicts worldwide growth of only 0.6% for this year. Meanwhile, Robert Coen, senior VP-

(Continued on Page I-25)

Electronics giants vie for consumers' ears

By Derek Suchard and Dagmar Mussey

The scene is set for a heated technology battle around the world as Philips Electronics, Matsushita Electric Industrial Co. and Sony Corp. launch the next generation of music systems.

Starting next month, Philips' digital compact cassette player/recorder line will roll out in Japan, the U.S., the Netherlands, France, Germany and the U.K.

Matsushita launched DCC equipment in Japan this month and plans to be in Europe and the U.S. by yearend. Sony's Mini-Disc compact disc player/recorder line will hit the shelves in Japan in November, followed by the U.S. and Europe in December.

Sony denies the products will go head-to-head.

"They are for different audiences. We don't intend to have any competition," a Sony Netherlands spokesman said.

But all the new products record sound digitally and offer sound closer to the quality of compact discs than analog cassettes. While DCC equipment will accept analog tapes, mini-disc machines won't accept standard-size compact discs.

"Consumers who once bought a CD will never switch to cassettes," one Sony executive said.

The audio technological battle is reminiscent of an earlier fight in the VCR market. Sony hasn't for-

(Continued on Page I-29)

WORLD NEWSWATCH

Y&R losses mount

MELBOURNE—The troubles at Young & Rubicam's office here continue as ANZ Banking Group pulled most of its $12 million business this month and consolidated it at the Campaign Palace. In the past 10 months, Y&R has lost major accounts including Kentucky Fried Chicken Corp. and NRMA Motorist Association, each worth about $10 million. In addition, the agency's chairman and creative director both have resigned.

South Korea sets TV ad rules

SEOUL—The Korean Broadcasting Commission adopted advertising regulations, including prohibiting ads for drinks containing more than 17% alcohol; requiring standard usage amounts in detergent ads; requiring instructions for safe disposal in ads for mercury batteries and vinyl; and barring commercials aired adjacent to chil-

(Continued on Page I-2)

Mark Anderson

Political maelstrom rocks Brazil shops

Gov't stops ads during impeachment crisis

By Maureen Meehan and Rik Turner

The Brazilian government, traditionally one of the country's biggest advertisers, has put nearly all its campaigns on hold because of the country's political crisis.

The move is hurting agencies already suffering because of Brazil's troubled economy.

By the end of this month, Brazil's Chamber of Deputies is expected to take up the issue of whether President Fernando Collor de Mello should be impeached for alleged wrongdoing. If the lower house votes for impeachment, the Senate will also vote. Two-thirds of each house must approve the move to impeach.

Congress is investigating allegations that the 43-year-old president and his former campaign fundraiser, Paolo Cesar Farias, misspent millions of dollars worth of government funds, set up illegal offshore companies, held phony bank accounts, racketeered, laundered money and engaged in influence peddling and extortion.

According to the National Federation of Advertising Agencies, 30% to 35% of the country's 4,000 agencies have government accounts.

The government's 1992 ad budget was $20 million, with 30% to 35% spent before its campaigns were put on hold, a government spokesman said.

Ad campaigns for advertisers, including a government-owned bank and oil company, have been suspended.

"The federal government is our biggest client, and the federal district government is our second," said Ricardo Rodrigues Pereira, regional director of Duailibi, Petit, Zaragoza Propaganda, Sao Paulo. "Many agencies have been at a standstill since the scandal broke in May."

"We are in a holding pattern. There is nothing we

(Continued on Page I-31)

Soviet collapse sparks upheaval in capitalist plans

Demise of centralized economy snarls carefully crafted ventures

By Betsy McKay

MOSCOW—Polaroid Corp. had an elegantly simple plan when it set up a joint venture in the Soviet Union in 1989: It would sell cameras and film to Soviet consumers while manufacturing products in the Soviet Union for export, thus turning its otherwise non-convertible rubles into dollars.

Polaroid and its Soviet partners began producing videocassette cases in Estonia at a state enterprise that made protective masks. Production costs were paid in rubles and the video cases exported for hard currency. Nice and neat.

Then came the breakup of the Soviet Union. Estonia cut off economic ties with Russia, and the two countries established stiff customs laws.

Shipments of polypropylene from the former Soviet Union's sole producer of the raw material, a plant in Tomsk in the Siberian region of Russia, were held up. The plant also had problems getting its own raw materials.

So the venture was forced to shell out hard currency to buy polypropylene from the West.

As if that wasn't enough, Estonia established its own currency, the krone; the venture paid wages in that currency. The krone was convertible into dollars but not into rubles.

So, much to its chagrin, Polaroid has ended up paying for its production in dollars after all—

(Continued on Page I-31)

Int'l publications gain among Europe's elite

By Laurel Wentz

LONDON—International publications have made major readership gains among prominent Europeans in the past four years, according to the Pan European Survey being unveiled this month to agencies and advertisers.

The study is a major media planning tool that surveys the international reading habits of the top 5% of Europeans every four years. Those surveyed are the 5% with the highest incomes, most prominent jobs and best education, among other criteria.

Findings showed 34.1% of prominent Europeans read at least one international publication, up from 32.9% in 1988.

Among individual publications, *National Geographic, Time, Financial Times, The Economist, Newsweek* and *The Wall Street*

Among prominent Europeans, 34.1% read at least one international publication.

Journal Europe scored the biggest readership increases.

"For 1993 planning, a lot of clients are waiting to have access to [the survey] for fine tuning and major revision of strategy," said Manfred Mareck, marketing director for *Newsweek's* Atlantic edition.

The fifth Pan European Survey measures readership among an estimated 5.7 million adults in 16 European countries.

National Geographic, with a readership of 592,000, up 28.1% since 1988, is by far the most widely read English-language publication among prominent Europeans. The next most widely read publication among survey respondents is the weekly *Time* at 313,000, up 19.9%, followed by the daily business newspaper *Financial Times*, with readership of 292,000, a 10.6% increase.

The *Financial Times* did particularly well among senior manag-

(Continued on Page I-29)

Nicole McCarter

Federico Fellini says running ads during movies on TV is "a very savage practice."

Fellini: Making ads 'is a fun experience'

Famed film director gets involved in Rome bank's TV campaign

Italian movie director Federico Fellini, an outspoken critic of commercial breaks, wrote and directed a TV campaign that began this month for Banca di Roma. The $25 million campaign was created by Saatchi & Saatchi Advertising, Rome. Mr. Fellini spoke with Ad Age International ***Correspondent Michelle McCarter in Rome about the campaign and TV commercials.***

Advertising Age: *Several years ago, you did the movie "Ginger & Fred," which was critical and satirical of commercial TV.*

Mr. Fellini: Of course it was. I had a precise target—[media mogul Silvio] Berlusconi. I don't have anything against advertising . . . everything is advertising. But I was mad at those who interrupt movies. And I can't be any other way.

I hate to see my work butchered by someone who has nothing to do with my movie—but who only bought it to make 10 times more money by butchering it. I find it a very savage practice. It is a crime. "Ginger & Fred" was about the stupidity of certain TV shows, of their delirious shows—nothing but containers for sponsors.

Berlusconi often says: "The harm Fellini did to me in France with 'Ginger & Fred.' He forced me to close shop [referring to Mr. Berlusconi's pullout from French TV station La Cinq]." This is very

(Continued on Page I-24)

New IAA president to continue battle for free expression

By Bruce Crumley

PARIS—Protecting freedom of expression in advertising and promoting the profession's image top the International Advertising Association's agenda at its 33rd world congress in Barcelona this week.

Mustapha Assad, who starts a two-year term as IAA president, said recent developments have made free expression a priority.

Mr. Assad, president-ceo at Publi-Graphics, will carry on the crusade that was also a main thrust of the outgoing president, Roger Neill, managing partner of Synectics International.

"We have seen of late in the EC, and now in France in particular, the introduction of legislation attacking advertising and limiting its freedom—be it in terms of marketing cigarettes, alcohol, children's products," Mr. Assad said.

"So long as these types of products are legally available to consumers, advertising must have the right to promote them responsibly . . . and must be trusted to exercise self-regulation," he said.

More than 700 ad executives are expected at the three-day congress, which starts today.

In Barcelona, the IAA will unveil a public service campaign explaining the benefits of advertising.

The campaign—created by volunteer creative director Barry Day, vice chairman-international of Lintas:Worldwide, and his agency—has two approaches. For developing markets, ads present straightforward information explaining the benefits of advertising, using the theme "Advertising—that's the way it works."

For developed markets, ads will debunk common consumer complaints such as "Why are there so many commercials?" "Oh, there's nothing in the paper but ads" and "We know all that," said Norman Vale, IAA director general. The tagline will be "Advertising—the right to choose."

The campaign is expected to run around the world, Mr. Vale said.

"In markets where we're under attack, we need to turn it around," Mr. Vale said. "It should have been done 20 years ago."

Mr. Vale said he has commitments from a number of newsweeklies to begin running the ads this week, as well as from monthlies and TV stations.

"Advertising must have the right to promote [legal products] responsibly."

Mustapha Assad

"We need to explain the role of advertising [in business] and demonstrate that it is an essential part of any healthy economy and one that serves an irreplaceable function," Mr. Assad said.

"At the same time, we want to raise public awareness to the part the IAA plays as a defender of the freedom of choice, advocate of self-regulation, provider of services and leading spokesman of international marketing," he added.

Mr. Vale acknowledged that the campaign, which the IAA decided to pursue at its last meeting two years ago, took much longer to complete than he expected and that he had been unable to get an advertiser to oversee the effort. Now, he said, the IAA will go back to advertisers and seek money to do an ongoing tracking study of attitudes as well as pay for producing more advertising. □

Nancy Giges contributed to this story.

Trade treaty boon to Mexico shops

New advertisers will seek place in market

By Elisabeth Malkin

MEXICO CITY—The North American Free Trade Agreement is nearly complete, and Mexican ad agencies are awaiting an onslaught of products from companies entering the market.

The agreement with the U.S. and Canada should lock into place many of the economic reforms already instituted by President Carlos Salinas de Gortari. Once a protected market, Mexico is gradually opening up to a variety of goods and services from abroad.

For ad agencies, the agreement means a growing number of new clients will test the waters of Mexico's booming consumer market of 86 million inhabitants and annual gross national product of an estimated $270 billion.

"The new companies that have no commitment with the big agencies will look at the local agencies," said Carlos Alazraki, president of Alazraki & Asociados Publicidad, a $12 million local shop and a private-sector adviser to Mexico's trade agreement negotiating team.

"The market is going to demand more quality and more productivity," he said. Local agencies may have to merge to become strong enough to meet the higher standards set by international product competition. They may also pick up business representing clients of U.S. agencies, Mr. Alazraki said.

Local industry executives don't expect a flood of new foreign agencies entering Mexico. Large international agencies accounted for some 44% of the $1.2 billion market in 1991 and already hold nearly all of the major multinational accounts. The agreement means these agencies could pick up more business from current clients adding products as well as new advertisers coming in, Mr. Alazraki said.

Mr. Alazraki hopes the agreement will motivate local agencies to improve creativity, which has so far been hampered by conservative clients.

"The problem is that we've been protected for too many years," he said. "This is a fantastic opportunity."

Certainly, one winner will be the Mexican consumer. With increased choice, consumers are going to become increasingly cost and quality conscious, said Sergio Lopez, general director of the Mexican Association of Advertising Agencies. And advertisers and their agencies are going to have to respond.

But there probably won't be any immediate explosion in ad spending or industry growth as a result of the free trade agreement, Mr. Alazraki warns. Instead, he said, the changes will evolve gradually over the next two years.

With the agreement still needing legislative approval in the U.S., Mexico and Canada, all these changes are long term. If the legislatures approve the agreement, it would take effect in January 1994.

"We are getting lots of letters" from U.S. agencies scouting for their clients [thinking about entering the market], but so far most of the clients are window-shopping, Mr. Alazraki said. "It's not that easy to open 15 Taco Bells right away."

Another concern is that media outlets are limited in Mexico, since some two-thirds of spending goes to TV, dominated by the Televisa media empire.

While most of the attention generated by the continental accord turns on U.S. interest in Mexican markets, Mr. Alazraki believes the pact could also open the way for Mexicans to head north.

Shops here "have to build a little network and go up to the States and buy a couple of agencies," he said. "We believe that we do better advertising than U.S. Hispanic agencies. We believe we definitely should get the Hispanic market." □

INTERNATIONAL ACCOUNTS IN REVIEW

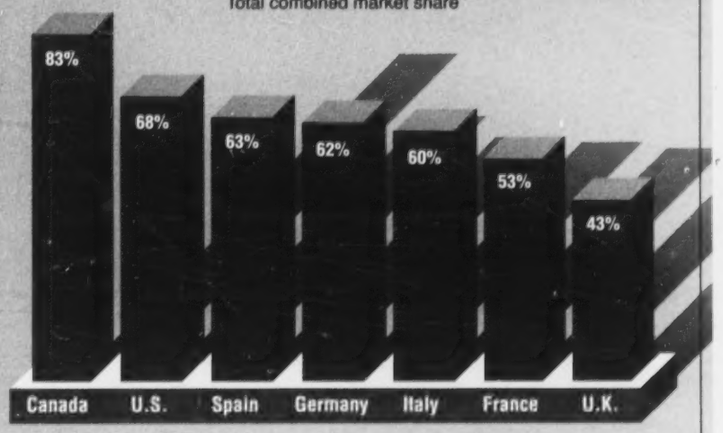
COUNTRY/BUDGET	CLIENT/BRANDS	CONTENDERS	INCUMBENT	DECISION DATE
Spain: $140 million	**SEAT autos**	BBDO Espana; others	TAPSA/N W Ayer	December
Europe: $40 million+	**Cadbury Schweppes Beverages**	DDB Needham; Young & Rubicam; Grey Ltd.	Saatchi & Saatchi Advertising; Foote, Cone & Belding; DDB Needham; others	November or later
Australia: $15 million	**Westpac Banking Corp.**	Magnus Nankervis & Curl; Lintas:Sydney; DMB&B/Weekes Morris Osborn	Chiat/Day/Mojo; Magnus Nankervis & Curl	Late September
Indonesia: $15 million	**Garuda Airlines**	Lintas:Singapore; GWD; Saatchi & Saatchi Advertising; Fortune Advertising; McCann-Erickson; AMC-Melewar-Zecha	Foote, Cone & Belding	Unknown
Canada: $15 million+ for three years	**Greater Montreal Convention & Tourist Bureau**	Marketel; PNMD/Publitel; Young & Rubicam	Unknown	October
Austria: $14 million	**Swarovski (crystal glassware)**	GGK; DDB Needham Heye & Partner; Springer & Jacoby	Several local shops	Unknown
Australia: $10 million	**NRMA, motorists service organization**	Incumbent; Saatchi & Saatchi Advertising; McCarthy Watson & Spencer; DMB&B/Weekes Morris Osborn; Foster Nunn Loveder; Doorley Buchanan	Young & Rubicam	October
Australia: $10 million	**Department of Defense**	Incumbents; George Patterson Pty.; Wunderman Cato Johnson with Young & Rubicam	Silver Partnership; Mattingly & Partners	December
Germany: $9 million	**Hyundai Motor Deutschland**	Knopf, Naegeli, Schnakenberg; Tostmann, Domann, Holzwarth; Braunschweiger & Goll; Damm, Koblenz; Alexander Demuth	Grey	Unknown
Germany: $7 million	**German Defense Ministry**	Lintas:Hamburg; ABC Eurocom; others	Krakow-McCann-Erickson	Unknown
Poland: $6 million	**LOT Airlines**	13 international agencies	In-house	Late November
Canada: $5 million+	**Canada Trust**	Unknown	In-house	Unknown
Australia: $5 million	**Sterling Health (analgesics)**	Leo Burnett Co.; Clemenger/BBDO; Campaign Palace	Lintas:Sydney	October
Germany: $4 million	**Bayer AG unit Drugofa's Dolial suncare line**	Lintas:Frankfurt; DMB&B; and an unknown Frankfurt agency	Wensauer DDB Needham	December
Puerto Rico: $2.5 million	**R.J. Reynolds Tobacco Co.**	Foote, Cone & Belding; McCann-Erickson Puerto Rico; eight others	Marti, Flores, Prieto & Wachtel	Late November
U.K.: $1.8 million	**The Financial Times**	BMP DDB Needham; Grey Ltd.; Delaney Fletcher Slaymaker Delaney & Bozell; Hoare Wilkins; Laing Henry	Ogilvy & Mather	October
Canada: $1.3 million	**Societe des Alcools du Quebec (government-owned retail outlets)**	Incumbent; NAT-COM Publicite Promotion; Blitz; Groupe Everest	Groupaction Marketing	Unknown

DATAWATCH

Ad Age International and A.C. Nielsen Co. examine trends in the global soft-drink and dog food markets in an exclusive study.

Coca-Cola, Pepsi-Cola and Cadbury Schweppes control the world soft-drink markets

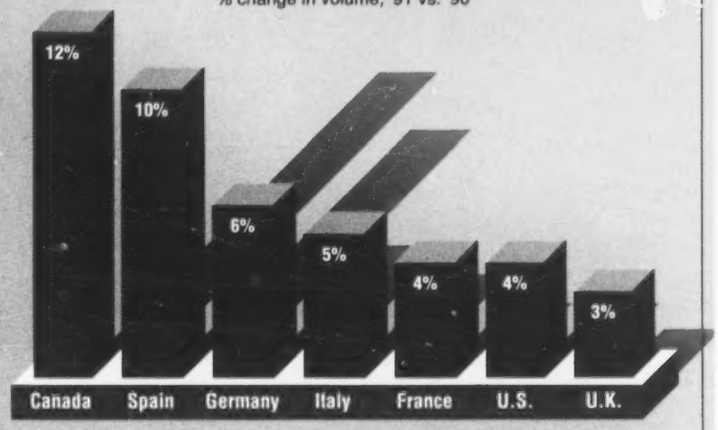
Total combined market share



Source: Nielsen Global Strategic Market Planner

Canada's soft-drink growth outpaces other countries'

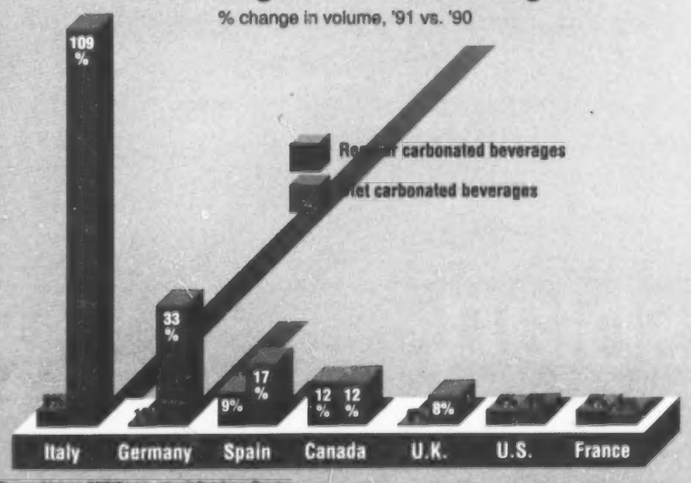
% change in volume, '91 vs. '90



Source: Nielsen Global Strategic Market Planner

Diet drinks grow faster than regular

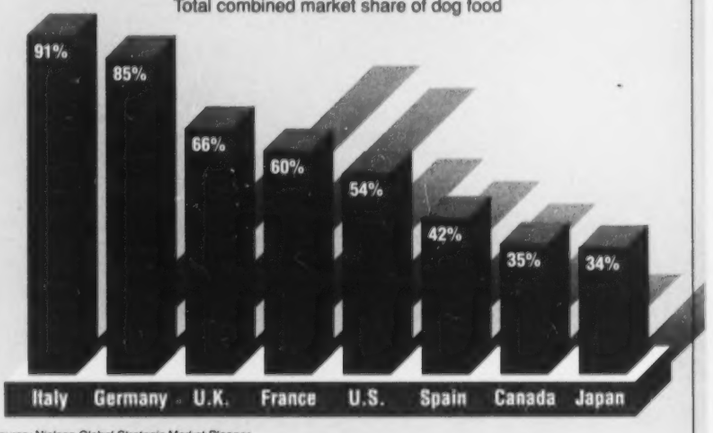
% change in volume, '91 vs. '90



Source: Nielsen ORBIT International Database Service

Mars, Purina, Quaker dominate world dog food markets

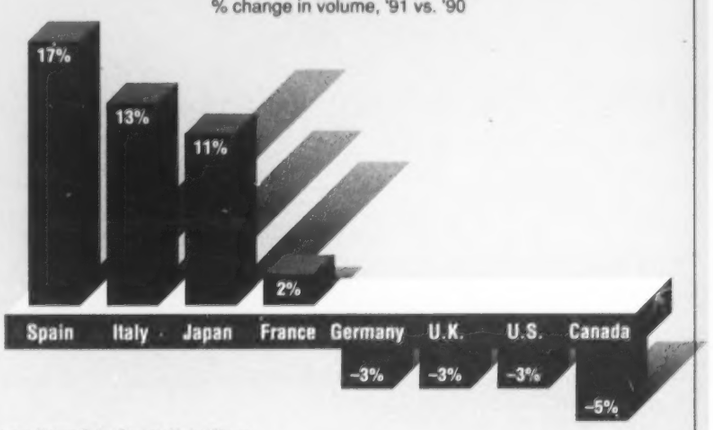
Total combined market share of dog food



Source: Nielsen Global Strategic Market Planner

Spanish dog food market outpaces other countries

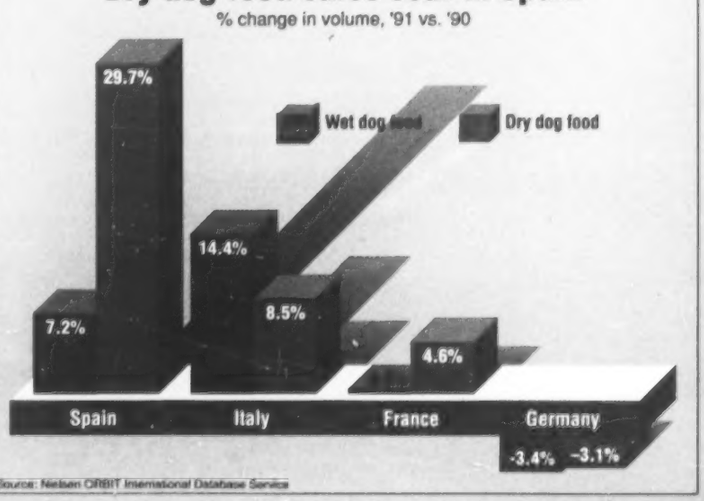
% change in volume, '91 vs. '90



Source: Nielsen Global Strategic Market Planner

Dry dog food sales soar in Spain

% change in volume, '91 vs. '90



Source: Nielsen ORBIT International Database Service

Rates double for airtime in Hungary

While ad execs rap poor service at country's most popular channel

By Ken Kasriel

BUDAPEST—Multinational advertisers and agencies are seething over the doubling of ad rates on Hungary's most-watched national TV channel, Magyar Television 1.

While prices soar, the station's service is poor, industry executives complain.

Magyar TV 1 announced in May that it would raise its rates July 1, but that produced such an outcry the channel postponed the effective date until Sept. 1 after a meeting with the Hungarian Advertising Association.

"A 40% increase followed by a 100% increase is an extreme kind of action that, in a more competitive TV market, might never have taken place," said Patrick Knight, general manager for Colgate-Palmolive Hungary.

Before the latest round of increases, rates had risen about 40% this year. This month the cost of a 60-second prime-time spot reached $8,750, a 98.1% hike from current rates. The same spot costs $4,167 on state-owned Magyar TV 2, the only other national channel.

Magyar TV 1 gets more than twice the number of requests for prime-time spots than are available, said Finance Director Laszlo Nagy.

A survey last fall by research company Gfk Budapest showed Magyar TV 1 with 71.6% share of the prime-time audience compared with 28.3% for Magyar TV 2. Magyar TV 1 attracts higher ratings because it carries popular programming, such as "Dallas," and most widely viewed Hungarian soap operas.

Even with the new rates, partly due to inflation and state budget cuts, Magyar TV 1's $1.44 prime-time cost per thousand is lower than Magyar TV 2's $1.79, said Thomas Oehler, director of Information Publicite, the station's ad representative.

GLOBAL MEDIA WORKS

Colgate's Mr. Knight also has had bad experiences with ad placement.

"Quite often, we see our spots back-to-back with Blend-a-Med, which is an absolute no-no in any other market," he said.

Procter & Gamble Co.'s Blend-a-Med is a direct competitor to Colgate toothpaste.

Mr. Oehler, noting that he couldn't confirm whether the two spots ran back-to-back, said, "Such things shouldn't happen, though it can have happened in the exceptional case."

Another common complaint is that Magyar TV 1 rarely confirms ad bookings within the eight days specified in its contract. At least three agencies—Leo Burnett Co., TopReklam/BBDO and RSCG Havasi & Varga—said Magyar TV 1 routinely waits weeks or months to confirm.

On May 20, Schwarzkopf Cosmetics withdrew orders made in late March for 17 prime-time spots for Taft hair spray after getting no response, said Winfried Haberland, Hungarian manager for the marketer.

Mr. Oehler said the Schwarzkopf case wasn't typical.

"Normally, the confirmation is going out within two weeks at the latest," he said.

Other complaints center on last-minute rescheduling of programming, which delays airing of spots until after prime time. Mr. Oehler conceded Magyar TV 1's schedule is often changed but said advertisers get refunds if their spots are pushed out of prime time.

Many advertisers are hoping for relief when the state monopoly on TV ends, but a media bill before Parliament has been repeatedly delayed since first being scheduled for passage in 1990.

However, on June 9, Hungary's Constitutional Court ordered Parliament to pass the media bill by Nov. 30. The Institute for Frequency Allocation expects the frequency moratorium will end shortly thereafter.

"If we had more channels, nobody would go to" Information Publicite, said Janos Sopronyi, managing director, Grey Budapest.

Fourteen applications have been received for licenses, eight of them foreign joint ventures, according to the institute. He wouldn't disclose their names. □

Japan shops tie to satellite TV

Though cable audiences are small now, channels will proliferate

By David Kilburn

TOKYO—Dentsu, Tokyu Agency and Hakuhodo are developing financial ties to satellite TV channels making their debuts.

Though cable audiences are small, they still provide value, said Hisahi Matsudaira, associate manager of Dentsu's New Electronic Media Division.

To get in on the ground floor, Japanese agencies are taking small stakes in cable TV companies that were licensed to launch satellite TV channels.

Research by Dentsu and Video Research Co. shows cable households have higher than average incomes and that the head of household has higher than average education and is also more likely to hold a senior managerial job or run his own company.

Shareholders in Japan Cable Television include Tokyu Agency with 9.1% and Dentsu with 1.8%. Dentsu is also an investor in Japan Sports Channel, holding 1.56%, while Tokyu Agency holds 10% of Music Channel. Satellite Film Theatre's shareholders include a 1% holding by Hakuhodo. Star Channel investors include Dentsu, Hakuhodo and Tokyu Agency, each with 2%.

NHK, Japan's public broadcasting corporation, already operates two noncommercial satellite channels, NHK-1 and NHK-2, as well as Japan Satellite Broadcasting Co.'s WOWOW channel.

The difference between communications satellites and broadcast satellites is important because many more channels are available via a communications satellite.

All the new communications satellite channels are expected to accept advertising. Although none of the current broadcast satellite channels takes ads, agency executives expect WOWOW to start selling a limited amount of ad time between programs next year.

"Non-satellite ad rates will eventually go down as the new media spread."

Dentsu research last August found that 29.6% of multichannel households watched cable during prime time, while 16.4% watched broadcast satellite. This suggests rates will fall for advertisers on terrestrial channels as they attract fewer viewers but involve more media buying work for ad agencies from the proliferation of channels.

"The rates for the existing terrestrial channels are unchanged now because the influence of [broadcast and communications satellite] TV and cable is very small. But the rates will eventually go down as the new media spread, since total viewing hours are unlikely to increase," said Akira Miyazawa, exec VP, McCann-Erickson Hakuhodo.

Many industry executives are pessimistic about audience growth because consumers would have to buy three sets of dishes and decoders to view all channels.

"It's unrealistic to expect consumers to make such an investment. For this reason, we do not think communications satellites will be big in terms of audience. The suppliers will probably survive as cable suppliers," said Moronae Ikeda, manager of Development Section 1 of Hakuhodo's New Media Division.

Even more channels are coming. In 1997, following the launch of another broadcast satellite, four more channels will start up. Projected launches of another four communications satellite channels could increase the number to 15 or more by the mid-1990s. The new stations are expected to give additional broadcasting opportunities to current terrestrial and cable broadcasters, as well as to companies new to the TV industry.

Agencies are optimistic about broadcast satellite services. NHK already has 5.5 million subscribers to its two satellite channels, while WOWOW has 850,000 subscribers. Japan Satellite Broadcasting has 801,000 subscribers. □

CHRIS ROY

Belgian homes receive the highest average number of cable channels—21.5—in Europe, according to Nielsen's Petar report.

For the report, only the Flanders region of Belgium was surveyed.

Germany and the Netherlands follow, averaging 18.2 and 17.5 channels, respectively.

While Denmark ranks fourth, having access to 15.4 channels, the Nordic countries bring up the rear.

The study found that Norwegian homes pick up 12 channels while Swedish households only receive 11.5.

The Nielsen Petar results are based on a sample of 2,341 individuals ages 4 and older who kept diaries for four weeks during November 1991. □

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Worldwide forecast

(Continued from Page I-1)
director of forecasting at McCann-Erickson Worldwide, New York, predicts 5.4% growth before excluding inflation.

Europe

On the brink of becoming a single market Jan. 1, Europe is expected to experience ad spending growth of only 0.7% this year, down from 2.4% earlier predicted by Zenith.

Spain has traded in its double-digit growth of the go-go '80s for low to no growth.

Local agency executives expect only 2% to 4% growth for this year, even though Spain hosted the Summer Olympics and Expo '92. Last year, ad spending grew 3.9%.

Zenith sees even harder times for Spain, predicting a fall of 2.8%.

"Spain is peaking out, plateauing" after a surge following its entry into the European Community, McCann's Mr. Coen said.

The outlook for 1993, the year after the Olympics, government budget cuts and tax hikes, is even bleaker.

Neighboring France is in a similar situation.

"Part of what Spain and France are going through is that they've succumbed to what the U.S. and U.K. have been going through," Zenith's Mr. Winram said.

This year, French ad spending should grow only 1% after falling 3% in 1991, local executives say. While Zenith expects a 0.6% decline, Mr. Coen sees 3% growth.

The worldwide recession has hit France later than, and not as severely as, the U.S., but advertisers' continuing wait-and-see mentality about the economy has stalled spending, even though the country hosted the Winter Olympics.

"We saw a light upturn in the first quarter of the year of 1%," said Jacques Bille, VP of France's Association of Advertising Agencies. "But at that point, we had no way of knowing whether this was the first step to real recovery or just a slight increase in activity."

Germany's growth is expected to slow to 3.5% this year from 7% in 1991, according to Bonn-based ZAW, the nation's tripartite ad association. Zenith predicts a 2.1% increase, down from 5.5%.

"The unification played a major part in the rise of the ad spending, and at exactly the same time the enormous rise of the private TV stations RTL Plus and SAT.1 occurred. If both had not happened, then the German ad climate would be similar to those of the neighboring countries," said Volker Nickel, ZAW manager.

The U.K., however, seems to be digging out after spending fell 10.4% in 1991.

"The pit of the [ad spending] recession in the U.K. was reached in the first quarter of 1991. Everything has been getting better since then, although people don't notice it," said Mike Waterson, research adviser to the U.K.'s Advertising Association.

While the ad association expects 4.6% growth this year in the U.K., Zenith predicts 1%.

Asia/Pacific

Zenith is predicting a relatively meager 4% growth for the region this year.

"The Japanese stock market and economy aren't looking too cheery," Mr. Winram said.

Partly to blame is the troubled Japanese economy, forcing local executives to predict a decline after years of uninterrupted growth.

"The business is getting much more competitive and clients are both reassessing how they use advertising and striving for more value for money," said Don Dillon, president-ceo of McCann-Erickson Hakuhodo, Tokyo.

CHRIS ROY

Dentsu is forecasting total ad spending will fall 1%, compared with last year's 0.9% gain.

Meanwhile, the Australian market continues to stumble. Total ad spending fell 4.5% last year, with the severe two-year recession blamed by most forecasters.

They now suggest media advertising may show a slight improvement in 1992 as Australia starts a slow recovery, and may register a flat year.

"This is another indication of the long-term trend toward increased below-the-line spending by advertisers, which has increased 50% in the past five years," said Kate Henley, Australian Association of National Advertisers executive director.

Alex Hamill, chairman-ceo of George Patterson Pty., Sydney, predicts spending will grow by about 4% in 1993.

South Africa

Ad spending in South Africa, once again hit by political instability, experienced an alarming downturn in May, dousing any hopes of real ad growth.

"People right now are running scared," said Peter de Klerck, Association of Advertising Agencies executive director. "They're uncertain what's going to happen politically, socially, economically. This has put a lot of plans on ice."

Americas

In the Americas, Canadian ad spending is shrinking. Sherland Forde, senior VP-media director at D'Arcy Masius Benton & Bowles, Toronto, estimates spending will shrink by 1.5% in 1992 following a flat 1991. However, a national referendum to approve constitutional reform this fall may boost spending slightly.

"People started out more optimistic," Mr. Forde said. "Now, they're realizing the turnaround hasn't happened, so they're cutting back."

Mexico serves as a bright spot, offering hopes of 15% to 20% growth this year after 1991's 24.5%, local executives say. McCann's Mr. Coen says growth could reach 4% to 5% while Zenith's Mr. Winram forecasts 9.5%.

Sergio Lopez, Mexican Association of Advertising Agencies director, attributed the rise to new clients entering the market.

"Inflation is rapidly coming under control, the free trade agreement has been completed and the presidential elections are coming," Zenith's Mr. Winram said.

The Brazilian economy, plagued by unpredictable surges in inflation, continues to cloud the picture so much that there are no forecasts available in real terms.

Ivan Pinto, president of MPM:Lintas Propaganda, Sao Paulo, said "1991 was perhaps the worst year we've ever had."

A spokesman for Unilever unit Ronald Rodrigues, spokesman for Industrias Gessy Lever said even if spending in Brazil does grow this year, "last year was such a bad one that the growth won't represent any great progress." □

Written from correspondent reports.

CALENDAR

October

■ **U.K.:** Oct. 15, **"The Outlook for Advertising & Media in 1993,"** conference, *Admap* in conjunction with the Advertising Association and James Capel & Co., London Press Center, 76 Shoe Lane, London, 44-71-828-2771.

■ **Japan:** Oct. 21, **National Association of Commercial Broadcasters in Japan,** Akita Cultural Center, Akita City, 81-3-3265-7481.

■ **Colombia:** Oct. 21-23, **Seventh Colombian Advertising Congress, "Creativity: Seduction & Leadership,"** Gethsemani Convention Center, sponsored by Advertising Agencies' Association of Colombia, Cartagena, 57-1-661-0011.

■ **Belgium:** Oct. 28-30, **"The Challenge of Branding Today & in the Future?"** European Society for Opinion & Marketing Research, Brussels Hilton Hotel, call Amsterdam, 31-20-664-2141.

November

■ **Czechoslovakia:** Nov. 11-13, **"Business-to-Business Marketing: Better Decisions From Added Value Research,"** European Society for Opinion & Marketing Research, Hotel Atrium Praha, Prague, call Amsterdam, 31-20-664-2141.

■ **Australia:** Nov. 13-15, **Broadcasting Association of Australia's 1992 Expo,** Albury Convention & Performing Arts Center, New South Wales, 61-2-310-2999.

■ **U.K.:** Nov. 16-18, **Olympiad Conference & Exhibition,** Centaur Conferences, London, with the Advertising Association, Olympia exhibition center, London, 44-71-434-3711.

■ **France:** Nov. 25-26, **"How to Endure in the Durables Industry,"** European Society for Opinion & Marketing Research, Paris Hilton Hotel, call Amsterdam, 31-20-664-2141.

■ **Greece:** Nov. 26-29, **Fifth Education Conference,** International Advertising Association, Athens Ledra Marriott Hotel, call Amsterdam, 31-20-659-4556.

December

■ **Monaco:** Dec. 2-4, **"Sponsorship Europe '92,"** European Society for Opinion & Marketing Research, Hotel Hermitage, Monte Carlo, call Maarssen, Netherlands, 31-3465-73777.

Send Calendar items to Ilse Cermak, Advertising Age International, *740 Rush St., Chicago 60611.*

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Renault has named a sporty compact, marketed only in Spain, after the popular rock group Mecano.

Renault rocking in Spain

Automaker names sporty compact after Mecano group

By John Pollack

MADRID—Renault has come up with a new way to establish a brand identity: name the car after a rock group.

The French automaker's newest entry in the Spanish market is Renault Clio Mecano, a sporty compact named after No. 1 pop group Mecano.

Mecano's three members—Jose Maria Cano, Ana Torroja and Nacho Cano—star in three different 30-second, 45-second and 120-second spots for the car. And Renault's Spanish dealer network is sponsoring the group's current tour in Spain.

Last year, Spaniards bought 60,265 Clios at just more than $10,000 each, a company spokesman said. But now "Mecano as a brand is much better known than the Clio," said Pedro Vilarrubi, account director at Saatchi & Saatchi Advertising, which handles the $15 million campaign. "The idea was to marry the two."

TV spots that broke Sept. 10 combine techniques of traditional car ads and trendy rock videos. Featuring the group's hit song "A Rose Is a Rose," the three musicians are shown composing music, practicing, driving to a concert in their Clio Mecano and striding onto the stage to the delight of screaming fans.

The 2-minute commercial is also being shown on large video screens at all Mecano concerts, where fans have a chance to win a limited-edition vehicle. Print ads, designed to look like album covers, carry the tagline "Dedicated to you."

Renault markets the Clio line throughout Europe. The Mecano version, sold only in Spain, is different because of the package of options it features, including a pullout radio and electric windows. Despite the additional options, the cars are similarly priced.

There are no plans to take the Mecano to other countries, and it's unknown whether the auto marketer will name other cars after different groups.

Renault held the No. 1 spot in Spain's 886,059-vehicle passenger car market last year with an 18.5% share. □

Readers

(Continued from Page I-3)

ers, where its readership of 123,000 is far higher than any other publication, said Keith Donaldson, market research executive at the daily.

The Economist ranked just below the *Financial Times* in readership at 262,000, a 25.2% gain since 1988 for the weekly.

The Pan European Survey's measure of growth for international publications in general may help persuade leading advertisers in Europe who spend their budgets on national media to create an international ad budget, said Hugh McCahey, *The Economist's* director of marketing.

Newsweek's readership among the survey audience increased by 33% to 236,000 in the new survey.

"One of our main competitors is *Time*," said *Newsweek's* Mr. Mareck. "In the last [Pan European Survey] we had about two-thirds of *Time's* audience. We now have about three-quarters of *Time's* audience."

He said PES enables publishers to do computer runs targeting specific reader groups at agencies' requests.

Survey readership for *The Wall Street Journal Europe*, soared by 82.4% for the daily to 62,000.

Three publications surveyed lost readership. *Fortune* fell by 11.8% to 90,000, possibly because some French respondents who named *Fortune* in 1988 referred to the every-other-weekly magazine's now-defunct French-language edition. *Scientific American's* readership fell 11.9% to 199,000 for the monthly, and the daily *International Herald Tribune* dropped by 2.7% to 72,000.

Europe's nine main in-flight magazines boosted readership by 64.3% to 1.135 million this year.

A mix of in-flight magazines allows advertisers flexibility to advertise more heavily in their biggest markets, said Christophe Mayer, marketing manager of the in-flight magazines representative RCI, Paris.

The Pan European Survey was carried out by Research Services, London. Almost 8,000 1-hour personal interviews were conducted between September 1991 and July 1992.

The $3 million project was sponsored by *The Economist, Financial Times, International Herald Tribune, Newsweek International, Scientific American, Time* and RCI. Margin of error is estimated at plus or minus 0.5 percentage points. □

'Time' tops Euro readership

Average readership per issue of daily, weekly and fortnightly publications, based on Pan European Survey universe.

Publication	Readership 1988	1992
Time	261,000	313,000
Financial Times	264,000	292,000
Economist	210,000	262,000
Newsweek	177,000	236,000
Business Week	99,000	121,000
The European	0	112,000
Fortune	102,000	90,000
International Herald Tribune	74,000	72,000
Wall Street Journal Europe	34,000	62,000
USA Today	10,000	15,000

Source: Pan European Survey

Audio

(Continued from Page I-1)

gotten its Beta format lost out to the more popular VHS from rival Matsushita.

Sony's new line offers four models—two for use in the home, and two hand-size personal models, one that records and plays back and one that only plays back. An automobile model is also planned.

Philips, concentrating first on the home component market, isn't offering a personal model. Matsushita, taking the opposite approach, is only offering a personal model at first.

The Sony products will start at about $875, Philips' at about $800 and Matsushita's at $1,100.

A survey of 332 Japanese consumers by Brain Child, a Tokyo market research company, found 61.1% preferred mini-disc players while 19% felt DCC equipment was superior. The remainder said they had no intention of buying either. The survey was conducted in May.

Analysts say marketing is a key element.

Philips' German launch budget alone is several million dollars, said Bernd Karau, ad manager of Philips Consumer Electronics, Hamburg.

For the next 14 months, more than half of Philips Audio's communications budget—including advertising, direct marketing and other efforts—will be for DCC, said Nikko Brokkind, marketing director for the unit.

According to Adtrack, a U.K. research company, Philips' consumer electronics division, to which the audio unit belongs, in 1991 spent $59.4 million on advertising in the 14 European markets where Adtrack measures print spending and the six European markets where TV is tracked.

Philips' advertising is themed "Your music will never be the same," developed by Propoganda, Los Angeles.

The campaign, adapted for each local market, will promote both the equipment as well as new recordings for use on the equipment, Mr. Brokkind said. Philips uses Euro Advertising, Duesseldorf, in Germany and Ogilvy & Mather in the rest of Europe.

The theme will be tailored to each market. In Germany, for instance, ads that broke this month show prominent musicians such as former Chicago Symphony Orchestra conductor Sir Georg Solti praising the new system.

Media will also vary from market to market, with a mix of print, TV and direct marketing.

The Sony campaigns are still in development. In Germany, Ernst & Partner, Duesseldorf, handles, while in Japan, Tokyu Agency International, Tokyo, handles.

One of Sony's prime target groups will be teen-agers because that age group is more accustomed to discs than adults are, an agency executive said. Sony's Mini-Disc will be marketed under the Walkman label.

Matsushita broke trade ads, via Dentsu, last week in Japan. Consumer ads are expected to break this week.

Philips is targeting its products to families who already have an extensive cassette library.

"DCC allows you to maintain your existing collection of cassettes," Mr. Brokkind said. "The actual music listening family in the Western world has 3.2 cassette functions [portable, car and in-house] and an average library of 60 cassettes. We've learned that people start to hate that industry that tells them to throw [their existing collection] away to accommodate new technology."

That's a challenge Sony will face since the Mini-Disc system can't use existing compact discs. □

David Kilburn contributed to this story.

VOLVO
Pehr Gyllenhammar
Chairman,
Volvo
People at the top read the Trib.
No local bias. No national slant. No partisan viewpoint.
Simply a balanced editing of the news
for people with a stake in international affairs.
Herald Tribune

JOAs face grim future

More dailies likely to disappear as agreements expire

By Christy Fisher

R.I.P., JOA.

The Newspaper Preservation Act of 1970 was supposed to preserve competition within a market by allowing dailies to merge business operations but keep separate editorial voices.

Instead, the number of U.S. dailies fell to 1,586 at the start of this year from 1,748 at the beginning of 1970, the Newspaper Association of America says. Nineteen joint operating agreements were in place at the start of 1992, but industry observers expect more JOAs—and more newspapers—to disappear in the next decade as those agreements are renegotiated or expire.

Newspapers have always had to vie for ad dollars. But more and more often, that competition is coming from outside sources with the explosion of other media.

MEDIA WORKS

The latest casualty is *The Tulsa* (Okla.) *Tribune*, which on Sept. 30 will publish its final edition. The afternoon paper's JOA with the morning *Tulsa World* was set to expire March 31, 1996, but the *Tribune* opted out early after it became apparent the agreement wouldn't be renewed. The *World's* weekday circulation for the six months ended March 31 was 131,199; the *Tribune's* was 66,647.

"I think we'll see a lot of buyouts, shutdowns and renegotiations of JOAs in the next 10 years or so," said Robert Picard, editor of the *Journal of Media Economics*. "We'll see many go the way of Tulsa."

"What JOAs do is delay the inevitable," said John Morton, newspaper analyst with Lynch, Jones & Ryan. "At some point, one newspaper becomes so weak it becomes a drag on the other. Then, they reach some type of agreement to end the thing."

The Tulsa daily's demise follows the disbanding last year of JOAs in Knoxville, Tenn., and Shreveport, La. JOA papers went out of business in Miami in 1988 and St. Louis in 1985.

"It will be increasingly difficult for two newspapers to survive in one city," said Edward Atorino, an analyst with Salomon Bros. "There are not enough ad dollars to go around, and readership numbers are discouraging" especially for afternoon papers.

Among remaining JOAs considered at risk is Pittsburgh, Mr. Picard said. The *Pittsburgh Post-Gazette* hasn't published since May 17 due to a strike by the Teamsters union.

"The newspaper strike puts the livelihood of the second paper in even more jeopardy," he said. "The longer the strike goes on, the longer advertisers will get used to putting their money elsewhere. The *Post-Gazette* has the most to lose."

The other, dominant paper in the JOA, *The Pittsburgh Press (see chart)*, is owned by E.W. Scripps Co. Scripps is involved in six JOAs, and Rich Boehne, the company's director of investor relations, said it's too early to say what will happen in each case.

"We have four JOAs where we are the junior partner—El Paso, Albuquerque, Cincinnati and Birmingham—and we have two JOAs where we are the senior partner—Pittsburgh and Evansville," he said. "Those four [junior JOA] newspapers are pretty darned good newspapers. We would argue that they are contributors. The purpose of JOAs is to maintain separate and competitive editorial voices, and from that point of view they work."

In Mr. Picard's view, "Cincinnati looks like a good candidate for a renegotiation or closure. Detroit has been a financial disaster but is [improving]. The Evansville, Ind., JOA ends in 1998, and there is a strong likelihood something will happen in San Francisco."

There's little incentive to set up a JOA in any of the 18 markets where competing newspapers under separate ownership remain, Mr. Picard said. "If the dominant paper knows it can hang on for another three or four years and then the other will die, then why should it split its profits for 20 to 30 years in a JOA when it can have full profits if it just hangs on for a few more years?" □

Markets where JOAs remain

Newspapers in joint operating agreements.

Paper	Circulation	Year JOA expires
San Francisco Chronicle (M) Examiner (E)	567,644 130,146	1995
The Evansville (Ind.) Courier (M) The Evansville Press (E)	63,063 32,739	1998
Pittsburgh Post-Gazette (M) The Pittsburgh Press (E)	153,832 208,554	1999
The Chattanooga (Tenn.) Times (M) Chattanooga News-Free Press (E)	43,169 48,398	2006
The Cincinnati Inquirer (M) The Cincinnati Post (E)	199,196 100,925	2007
The Salt Lake City Tribune (M) The Deseret News (E)	116,289 62,335	2012
Birmingham (Ala.) Post-Herald (M) The Birmingham News (E)	63,720 165,676	2015
El Paso (Texas) Times (M) El Paso Herald-Post (E)	66,626 29,119	2015
The (Tucson) Arizona Daily Star (M) Tucson Citizen (E)	100,331 52,165	2015
The (Fort Wayne, Ind.) Journal-Gazette (M) The News-Sentinel (E)	62,220 55,416	2020
Albuquerque (N.M.) Journal (M) The Albuquerque Tribune (E)	115,565 36,016	2022
The Honolulu Advertiser (M) Honolulu Star-Bulletin (E)	105,670 88,460	2022
The (Nashville) Tennessean (M) Nashville Banner (E)	140,430 61,257	2022
Seattle Post-Intelligencer (M) The Seattle Times (E)	204,656 237,814	2032
The Charleston (W.Va.) Gazette (M) Charleston Daily Mail (E)	54,440 49,310	2036
Las Vegas (Nev.) Review-Journal (M) Las Vegas Review-Journal/Sun (E)	129,422 35,481	2049
Detroit Free Press (M) The Detroit News (E)	587,952 421,006	2086
York (Pa.) Daily Record (M) The York Dispatch (E)	40,841 39,821	2090

M=morning publication; E=evening publication.
Sources: Average Monday through Friday or Monday through Saturday circulation figures from Audit Bureau of Circulations for the six months ended March 31, 1992 (except for El Paso, which is for the three months ended March 31); JOA expiration dates from *Journal of Media Economics*

City, business books in Philly to join forces

By Laura Loro

Philadelphia Magazine and the *Philadelphia Business Journal* plan to jointly publish special sections that will run in both publications.

"It's a sign of the times when two print media in the same market join together. It is the '90s. We are all cooperating," said David Lipson, publisher of Metrocorp's *Philadelphia*.

The venture may mark the first time a business journal and a city magazine have teamed up, said Jack Roberts, editor of *Philadelphia Business Journal*.

The first section, set for February, will focus on personal finance. It will be 16 pages, including eight pages of ads, with a combined circulation of about 150,000. A second section is set for next September.

Editorial will be chiefly done by the *Philadelphia Business Journal* staff with *Philadelphia* staff handling photography, layout and design. Advertising will be sold jointly. The local ad rate is $12,000 for a color page.

"It's a chance for advertisers to be in two media, one a more consumer environment and one a more business environment," Mr. Lipson said. "It attracts an advertiser that may not have looked at *Philly Magazine* before."

Half the ads for the first section have been sold, he said, though he wouldn't name the marketers. Categories of targeted advertisers include banks, brokerage houses and financial services institutions.

"*Philadelphia Magazine* hasn't done much business coverage," Mr. Roberts said. "They get appealing business coverage and get business advertisers. We get the ability to sell to a much larger audience."

The publications have very different editorial approaches. There was some question whether *Philadelphia* readers would notice the different writing style, since most of the editorial will be generated by *Journal* staffers.

"We'll trumpet it in such a way, [readers will] realize it is a special section," said *Philadelphia* Editor Eliot Kaplan. "And it is along the lines of the service stories we do." □

Magazine cites 8 media companies

NEW YORK—Eight media companies were included on *Working Mother's* annual list of the 100 best companies for mothers employed outside the home.

Media companies that made the grade included Time Warner and its Home Box Office subsidiary; Gannett Co.; *The Seattle Times; St. Petersburg* (Fla.) *Times;* Quad/-Graphics, a Pewaukee, Wis.-based printer and parent of *Milwaukee Magazine;* LucasArts Entertainment; and the Bureau of National Affairs, the Washington-based publisher of public policy newsletters.

Quad/Graphics and the *St. Petersburg Times* were newcomers to the top 100.

The Lang Communications monthly ranks the companies based on such factors as pay, opportunities for advancement, support for childcare and family-friendly benefits such as job sharing, maternity leave and leave to care for elderly relatives. This is *Working Mother's* seventh such survey. □

Joe Mandese coordinates MediaWorks.

Way to go Elle! An 11% increase in August ad pages.

Now that's the power of print.

We're proud to be the first and only printer of Elle Magazine,

and salute you on this admirable achievement.

Ringier America.

The power of printing.

Catalogs • Consumer & Special Interest Magazines • Books

CONSUMER MAGAZINE AD LINAGE

	August		Year-to-date	
	1992	1991	1992	1991
■ Auto/cycle/rec. vehicles				
AutoWeek (52X)	131.5	113.8	1,087.8	1,025.9
Automobile Magazine C.	62.3	66.8	551.1	536.1
Car & Driver C.	98.9	98.6	815.5	846.2
Car Collector & Car Classics	46.0	27.0	297.0	172.0
Car Craft	51.6	58.7	460.9	485.4
Circle Track	82.5	73.6	707.0	661.3
Cycle World	57.8	45.2	504.3	380.0
Dirt Rider	38.0	31.0	374.4	326.8
Dune Buggies & Hot VWs	76.6	80.9	619.5	563.7
Easyriders	39.7	37.1	342.1	314.6
Family Motor Coaching	164.7	153.2	1,399.0	1,304.7
Four Wheeler C.	71.9	76.0	573.7	617.1
Hot Rod C.	48.5	56.1	459.9	513.0
Motorcyclist	47.9	47.4	411.5	385.1
Motor Trend C.	53.3	47.8	507.3	565.9
Motorhome	75.6	86.1	572.1	654.6
Petersen's 4 Wheel	92.5	84.3	588.1	567.9
Rider	30.9	27.9	333.9	315.8
Road & Track C.	87.4	88.7	764.8	713.3
Trailer Life	61.7	79.8	571.6	644.9
Total Group	**1,419.1**	**1,379.8**	**11,941.5**	**11,594.3**
% change	**2.8%**		**3.0%**	
■ Boating & yachting				
Boating	83.7	70.6	1,008.4	760.4
Chesapeake Bay	28.6	23.5	242.2	232.6
Cruising World	74.4	89.9	645.4	805.4
Lakeland Boating (11X)	65.2	51.9	578.0	514.4
Motor Boating & Sailing	61.2	66.1	831.3	766.8
Sail	85.4	92.8	818.4	792.8
Sailing World	30.5	41.7	292.8	385.8
Trailer Boats (11X)	31.9	27.8	433.7	438.5
Yachting C.	88.0	85.4	925.0	888.2
Total Group	**548.9**	**549.6**	**5,775.3**	**5,584.8**
% change	**-0.1%**		**3.4%**	
■ Civic/fraternal				
Elk (10X)	17.0	16.5	120.4	111.9
Kiwanis (10X)	19.9	26.5	129.0	128.6
Lion (10X)	—	—	44.1	56.2
Rotarian	12.1	10.2	117.6	120.1
V.F.W. (11X)	23.7	27.7	174.6	197.4
Total Group	**72.7**	**80.9**	**585.7**	**614.2**
% change	**-10.1%**		**-4.6%**	
■ General				
American Health (10X) C.	—	—	285.7	197.0
American Heritage (8X) C.	—	—	145.5	202.6
American Legion	23.0	25.0	237.7	256.1
Archaeology (6X)	—	—	100.0	121.4
Art & Antiques (10X) C.	—	—	236.6	343.5
ARTnews (10X)	—	—	410.7	533.5
The Atlantic C.	39.4	38.9	415.8	382.5
Bon Appetit C.	60.0	55.3	554.8	560.3
Buena Salud	14.1	24.3	140.8	209.9
Cable Guide Plus Total TV C.	26.4	27.2	202.6	198.5
Caribbean Travel & Life (6X) A.	52.7	37.8	219.0	222.9
Conde Nast Traveler C.	52.6	45.5	590.0	617.9
Consumers Digest (6X) C.	20.5	—	109.2	86.4
Cooking Light (7X) C.	—	—	269.5	230.7
Country America (10X) C.	58.1	—	308.7	271.5
Departures N. America (6X)	23.2	42.5	130.7	214.9
Ebony C.	73.9	66.4	592.2	620.9
Endless Vacation (8X) C.	—	—	174.8	127.8
Food & Wine C.	31.4	36.3	356.6	335.5
Golden Years (6X)	26.8	24.0	125.5	112.4
Gourmet C.	52.8	50.1	620.1	665.3
Harper's Magazine C.	18.2	25.5	207.1	237.1
Islands (6X) C.	—	—	325.8	331.5
Kiplingers Personal Finance C.	35.6	34.7	433.8	355.0
Let's Live	37.0	33.0	313.0	328.0
Life C.	40.3	31.3	318.2	319.5
Longevity C.	46.3	40.8	404.5	349.5
Mature Outlook (6X) C.	—	—	176.6	163.1
Modern Maturity (6X) C.	31.3	30.4	132.8	128.1
Money C.	100.8	80.7	805.5	731.9
National Geographic C.	17.4	20.9	176.4	183.3
National Geographic Traveler (6X) C.	—	—	200.5	168.7
Natural History C.	15.7	23.2	188.0	244.2
New Choices for Retired Living (10X) C.	—	—	195.0	200.3
Prevention C.	39.1	29.8	359.6	310.4
Reader's Digest C.	51.1	41.9	572.2	546.5
Sat. Evening Post (9X) C.	—	—	138.2	168.3
Smithsonian C.	47.4	46.6	475.8	527.9
Town & Country C.	25.3	61.3	372.6	569.5
Travel-Holiday (10X) C.	—	—	291.8	306.3
Travel & Leisure C.	75.0	50.4	739.0	805.8
Travelhost	116.1	123.1	953.0	973.2
US Magazine C.	39.7	32.6	275.1	291.8
Utne Reader (6X)	44.0	42.0	207.8	180.7
Vanity Fair C.	93.2	75.6	791.8	715.5
The Walking Mag. (6X) C.	36.4	28.9	151.7	133.6
Yankee C.	40.4	41.3	411.6	427.1
Total Group	**1,504.8**	**1,367.1**	**15,843.6**	**16,208.0**
% change	**10.1%**		**-2.2%**	
■ Home				
Architectural Digest C.	65.7	116.5	717.5	815.9
Better Homes & Gardens C.	93.3	81.3	853.4	797.5
Colonial Homes (6X) C.	28.1	34.7	184.6	187.0
Columbus Monthly-Homes (4X)	—	—	54.7	64.4
Country Home (6X) C.	54.5	49.2	248.8	233.7
Country Life (6X)	20.3	35.8	124.7	195.0
Country Living C.	69.0	73.2	664.1	596.7
Decorating Remodeling (8X) C.	—	54.0	226.8	246.3
Family Handyman (10X) C.	—	—	279.1	299.3
Flower & Garden (6X)	42.0	33.6	187.8	163.8
HG C.	43.5	45.6	424.4	522.6
Home C.	—	27.4	389.2	348.9
Home Mechanix (10X) C.	—	—	235.9	275.2
Horticulture (10X)	46.3	50.8	332.3	342.0
House Beautiful C.	67.4	46.8	482.7	435.7
Metropolis (10X)	—	—	306.2	316.7
Metropolitan Home C.	55.5	45.7	467.3	509.9
Midwest Living (6X) C.	70.0	56.0	322.6	275.9
Organic Gardening (9X) C.	—	—	266.9	292.9
Phoenix Home/Garden	46.8	34.8	396.4	374.2
Practical Home-owner (9X) C.	44.5	47.9	147.8	299.2
San Diego Home/Garden	58.1	44.2	450.3	495.5
Southern Accents (10X) C.	—	—	298.9	275.4
Southern Living C.	101.6	59.4	885.0	738.3
Sunset Magazine C.	79.3	65.3	816.8	907.3
Traditional Home (6X) C.	—	26.4	147.7	107.2
Workbench (6X)	49.6	31.4	201.6	149.5
Total Group	**1,035.5**	**1,059.9**	**10,113.2**	**10,265.7**
% change	**-2.3%**		**-1.5%**	
■ In-flight & other passenger				
Aboard Group (6X)	—	—	151.7	150.3
Alaska Airlines	55.8	42.3	410.4	412.0
America West Airlines	48.3	48.2	428.5	510.0
American Way (24X) C.	136.8	101.5	1,098.0	922.5
Delta Sky C.	69.0	54.4	600.4	498.4
Northwest Air World Traveler C.	76.2	45.0	491.5	324.0
Spirit of Aloha	35.3	38.3	302.9	281.3
TWA Ambassador A.	38.2	26.7	303.4	208.5
United Vis 'A Vis	75.0	62.9	569.3	531.7
US Air Magazine	73.2	63.8	578.4	515.4
Total Group	**607.9**	**483.1**	**4,934.5**	**4,354.1**
% change	**25.8%**		**13.3%**	
■ Men's				
Details	35.7	22.7	302.1	189.0
Esquire C.	60.8	53.2	525.6	491.5
Firehouse Magazine	35.3	29.0	336.0	316.8
Gentlemen's Quarterly C.	106.9	105.3	777.9	877.0
M Magazine C.	51.0	53.3	377.5	343.7
Men's Fitness	43.8	36.0	310.9	278.7
Men's Health (6X)	23.9	16.3	91.0	86.8
Muscle & Fitness C.	110.0	113.6	957.2	944.6
Penthouse C.	64.1	63.1	494.3	482.0
Playboy C.	40.9	48.0	392.3	476.2
Popular Mechanics C.	48.5	44.2	455.6	456.0
Total Group	**620.7**	**584.8**	**5,020.4**	**4,942.1**
% change	**6.1%**		**1.6%**	
■ Metropolitan				
Aloha (6X)	—	—	125.8	138.0
Annapolitan (10X) A.	24.9	35.7	242.7	328.1
Atlanta	61.0	72.3	476.4	543.8
Baltimore	33.5	39.9	258.8	359.5
Boston	84.4	93.7	575.9	604.6
Chicago	56.5	50.7	524.2	551.5
Chicago's North Shore	82.4	79.5	627.5	598.1
Cincinnati	55.3	21.7	294.7	245.5
Cleveland	42.5	55.4	437.5	367.2
Columbus Monthly	32.8	29.3	321.9	342.2
Connecticut	55.0	58.2	451.5	467.0
D/Magazine	40.2	55.4	340.5	385.8
Detroit Monthly	36.9	38.0	410.0	342.6
Diablo	48.6	43.6	467.2	432.5
Grand Rapids	16.0	16.7	157.7	197.7
Honolulu	61.3	89.1	307.5	391.9
Houston Metropolitan Magazine	71.3	66.6	499.5	492.3
L.A. Style	53.9	67.5	369.3	561.3
Los Angeles	106.9	124.9	687.3	749.6
Louisville	35.2	34.5	303.2	337.7
Madison	40.0	28.0	320.0	265.0
Memphis	74.4	101.0	298.0	420.3
Mid Atlantic Country	65.9	59.3	468.2	421.0
Milwaukee	37.7	57.8	323.6	446.0
Minneapolis/St. Paul	134.7	104.3	757.2	655.6
Minnesota Monthly Mag	65.3	61.9	463.4	407.0
New Jersey Monthly	39.6	55.9	368.8	356.2
New Mexico	54.8	51.4	346.6	344.6
Ohio	58.8	62.2	370.7	374.7
Orlando	53.4	67.1	433.3	682.6
Pacific Northwest (9X) A.	—	59.8	223.6	258.3
Palm Springs Life	50.3	38.4	768.0	797.3
Philadelphia	128.8	142.3	715.4	833.2
Phoenix	25.5	24.2	248.1	215.6
Pittsburgh	63.2	57.2	507.2	494.7
Rhode Island Monthly	31.7	35.6	243.6	293.7
Sacramento Magazine	54.1	37.0	354.7	383.3
San Diego	89.0	117.3	625.2	687.3
San Francisco Focus C.	67.5	87.0	537.5	551.5
Sarasota (10X)	—	—	462.8	458.2
South Florida Magazine	45.5	31.6	443.1	358.5
Texas Monthly C.	110.0	91.8	837.9	838.4
The Washingtonian	95.5	95.0	655.5	745.0
Total Group	**2,384.1**	**2,538.7**	**18,651.2**	**19,724.5**
% change	**-6.1%**		**-5.4%**	
■ Music/entertainment				
Audio	54.2	52.5	513.3	567.6
Dance Magazine	43.0	36.9	445.0	434.5
Entertainment Weekly (52X) C.	73.8	60.3	609.7	521.8
Premiere C.	44.4	47.3	418.4	432.2
Rolling Stone (25X) C.	91.0	113.5	916.7	963.7
Spin C.	50.9	56.5	383.6	348.8
Video Magazine	59.0	68.4	539.0	538.5
Total Group	**416.4**	**435.4**	**3,825.7**	**3,807.0**
% change	**-4.4%**		**0.5%**	
■ Outdoor & sport				
Alaska	27.9	31.3	284.2	326.9
The American Handgunner (6X)	75.0	60.0	276.0	220.0
American Hunter	23.1	20.7	131.2	144.3
American Rifleman	23.9	26.5	169.6	164.7
Audubon (6X) C.	—	—	175.3	171.4
Backpacker (8X) C.	37.1	32.8	224.3	190.2
B.A.S.S. Times	20.2	19.5	169.3	116.1
Bassmaster (10X) C.	—	—	438.5	445.8
Bicycling (10X) C.	61.7	73.6	639.2	733.4
Ducks Unlimited (6X)	34.5	19.2	120.0	98.0
Field & Stream C.	28.8	38.2	437.5	476.3
Fishing World (6X)	13.1	19.4	117.6	117.5
Flex	96.8	82.8	751.4	626.8
Florida Sportsman	74.2	61.8	841.6	842.1
Golf Digest C.	64.4	76.3	783.2	758.0
Golf Magazine C.	84.5	74.9	963.4	827.1
Guns	50.0	40.0	361.0	292.0
Guns & Ammo	32.1	34.9	294.8	283.7
In-Fisherman (7X)	—	—	368.0	356.0
Outdoor Life C.	28.7	38.9	392.7	476.1
Outside Magazine C.	65.0	49.7	631.5	546.9
Petersen's Hunting	44.5	48.9	287.1	273.3
Runner's World C.	45.5	44.5	402.3	379.9
Salt Water Sportsman C.	61.1	51.7	646.1	672.8
Shooting Times	31.5	40.2	272.7	234.6
Sierra (6X) C.	—	—	184.8	163.8
Ski (8X) C.	—	—	283.0	301.6
Skiing (7X) C.	—	—	268.0	229.6
Skin Diver C.	112.0	118.2	917.9	983.6
Southern Outdoors (9X)	46.3	37.7	291.9	247.2
Southern/Western Links (6X)	52.2	26.2	215.0	138.6
Sport Magazine C.	28.1	31.7	196.1	252.4
Sports Afield C.	55.2	46.9	467.2	477.6
Surfing	67.8	60.3	408.1	457.2
Tennis C.	54.5	54.8	517.8	469.2
Volleyball A.	64.8	41.2	279.9	171.7
Waterski (10X)	47.7	48.0	519.8	476.0
Western Outdoors (9X)	17.3	22.2	145.8	134.2
Wind Surfing (8X)	41.3	41.6	363.6	340.3
Total Group	**1,610.5**	**1,514.7**	**15,237.4**	**14,616.9**
% change	**6.3%**		**4.2%**	
■ Photography				
American Photo (6X) C.	—	—	180.5	202.9
Outdoor Photographer (10X)	34.6	29.5	210.7	186.2
Petersen's Photographic	47.1	30.4	440.7	276.3
Popular Photography C.	111.2	102.9	871.7	842.3
Shutterbug	173.0	182.0	1,390.0	1,391.0
Total Group	**365.9**	**344.8**	**3,093.5**	**2,898.7**
% change	**6.1%**		**6.7%**	
■ Science/electronic/mech				
Compute C.	66.8	51.6	512.5	535.5
Discover A. C.	19.2	25.0	164.8	227.4
Home Office Computing C.	47.8	27.3	370.2	265.5
Omni C.	48.1	46.5	457.5	434.3
Popular Science C.	69.2	40.8	487.8	451.4
Scientific American C.	43.7	23.8	381.2	360.1
Spectrum C.	26.7	29.2	301.8	331.4
Total Group	**321.4**	**244.1**	**2,675.8**	**2,605.5**
% change	**31.7%**		**2.7%**	
■ Woman/fashion/service				
Allure C.	55.7	23.8	335.6	176.8
Bride's Magazine (6X) C.	589.0	525.5	2,249.7	2,220.1
Child (10X) C.	76.9	57.8	440.1	337.4
Cosmopolitan C.	151.3	131.0	1,249.9	1,258.2
Elegant Bride (6X)	180.7	193.1	976.6	693.0
Elle C.	116.9	104.9	881.2	955.8
Essence C.	75.2	75.2	547.0	502.9
Family Circle (17X) C.	105.0	76.7	1,036.3	901.5
Glamour C.	153.6	125.3	1,015.9	1,039.7
Good Housekeeping C.	124.6	102.9	1,051.0	979.9
Harper's Bazaar C.	56.3	67.2	469.7	624.8
Imagen	82.1	61.6	507.1	553.3
Ladies' Home Journal C.	98.9	74.6	859.5	906.6
Lear's C.	34.3	34.1	285.8	289.4
Mademoiselle C.	125.6	104.3	767.2	817.7
McCall's C.	96.0	68.0	707.5	618.5
Military Lifestyle A.	—	—	311.5	395.7
Mirabella C.	56.2	54.0	452.1	529.6
Modern Bride (6X) C.	524.3	508.2	1,893.8	1,927.8
New Woman C.	52.5	43.4	480.2	471.1
Parenting C.	97.5	69.2	645.4	485.8
Parents Magazine C.	106.3	92.7	893.7	838.5
Redbook C.	86.6	68.2	714.9	664.9
Sassy C.	69.0	63.3	343.4	304.4
Self C.	73.8	58.6	595.7	572.7
Seventeen C.	130.8	146.3	622.4	668.6
Shape C.	56.7	52.7	522.5	435.0
Soap Opera Digest (26X) C.	36.0	26.2	287.0	263.8
Teen Magazine	81.2	81.2	377.7	370.4
True Story C.	42.4	47.0	333.3	333.7
Victoria C.	40.2	33.7	293.0	307.0
Vogue C.	173.8	183.0	1,445.0	1,465.3
W Magazine (26X) C.	92.5	217.4	692.5	757.6
Weight Watchers C.	24.1	29.3	229.0	258.3
Woman's Day (15X) C.	97.6	81.8	915.1	742.5
Workbasket (6X)	39.5	25.5	155.7	126.7
Working Mother C.	68.5	39.4	414.8	418.8
Working Woman C.	45.6	43.2	432.2	509.3
YM-Young & Modern (10X)	64.9	59.5	272.6	279.1
Total Group	**4,161.8**	**3,849.6**	**27,025.4**	**26,044.2**
% change	**8.6%**		**3.8%**	
■ Youth				
Boys' Life C.	15.8	8.0	133.0	117.7
Campus Life (10X)	—	—	256.8	258.0
Total Group	**15.8**	**8.0**	**389.8**	**375.7**
% change	**98.0%**		**3.7%**	
■ Business/national				
Barron's	79.1	96.2	992.8	977.6
Black Enterprise C.	58.3	60.4	686.9	619.3
Business Week (52X) C.	161.0	175.4	2,136.9	1,971.9
Economist (52X) C.	141.2	158.9	1,764.1	1,463.3
Entrepreneur C.	129.5	135.5	1,364.5	1,311.6
Entrepreneurial Woman (7X) C.	—	—	267.0	238.2
Financial World (26X) C.	43.7	42.9	663.8	416.3
Forbes (26X) C.	221.5	310.6	2,015.5	2,011.3
Fortune (26X) C.	198.5	159.1	1,573.7	1,643.8
Frequent Flyer	24.2	27.3	215.5	269.6
Futures	23.8	25.7	297.4	293.7
Harvard Bus. Review (6X) C.	—	—	170.2	202.2
Inc. Magazine C.	53.4	59.2	684.9	555.3
Income Opportunities	72.4	71.0	447.1	504.2
Industry Week (23X)	71.7	57.3	540.1	569.0
Nation's Business C.	20.5	16.4	221.8	187.9
Success C.	34.1	43.0	221.1	273.5
Total Group	**1,332.9**	**1,438.9**	**14,263.2**	**13,508.8**
% change	**-7.4%**		**5.6%**	
■ Business/regional				
Bus. First-Columbus (52X)	123.4	74.2	859.2	723.7
Bus. Jrnl.-Milwaukee (52X)	108.1	100.8	858.1	903.2
Bus. Jrnl.-Sacramento (52X)	78.7	86.0	583.8	598.0
Bus. North Carolina	34.8	22.3	227.4	255.7
Capital Dist. Bus. Review (52X)	71.6	59.1	582.7	606.8
Caribbean Business	104.3	131.5	761.1	776.8
Corporate Rpt. Minnesota	31.5	48.8	311.4	395.9
Crain's Chicago Bus. (52X)	103.0	81.7	827.1	840.4
Crain's Cleveland Bus. (52X)	65.6	38.2	472.3	456.5
Crain's Detroit Bus. (52X)	56.9	50.1	496.8	500.2
Crain's New York Bus. (52X)	43.0	44.0	470.0	462.0
Florida Trend (12X)	56.0	35.4	336.7	295.0
Georgia Trend	30.8	26.2	238.0	272.8
Grand Rapids Bus. Jrnl.	68.5	47.9	424.2	412.1
Hawaii Business	119.3	118.2	427.0	436.0
Houston Bus. Jrnl. (52X)	150.5	101.0	1,111.4	913.6
Indianapolis Bus. Jrnl (52X)	111.4	120.3	921.3	1,021.7
Nashville Bus. & Lifestyle	17.5	21.9	120.8	161.4
New Orleans City Business (52X) A.	97.9	50.9	635.4	398.7
Pacific Bus. News (52X)	154.7	117.6	920.8	870.7
Philadelphia Bus. Jrnl (52X)	100.2	70.2	800.1	750.7
Providence Business News	62.8	57.7	569.4	545.9
St. Louis Bus. Jrnl. (52X)	145.2	101.2	967.0	976.6
Warfield's Business Record-Maryland (52X) B.	46.5	58.7	317.8	425.0
Total Group	**1,982.1**	**1,664.0**	**14,239.7**	**13,999.4**
% change	**19.1%**		**1.7%**	
■ National Sunday mags				
Parade (52X) C.	74.5	68.0	556.9	493.7
USA Weekend (52X) C.	62.7	61.6	499.7	433.6
Vista Magazine (12X)	19.8	13.3	122.1	114.9
Total Group	**156.9**	**142.8**	**1,178.7**	**1,042.2**
% change	**9.9%**		**13.1%**	
■ Newspaper Sunday magazine				
Boston Globe	100.3	111.7	912.0	890.2
Chicago Tribune	60.4	76.9	757.3	722.8
Cleveland Plain Dealer	50.4	47.8	342.4	332.2
The Dallas Morning News	58.2	40.0	418.2	344.0
Detroit Free Press	33.0	26.0	245.0	258.0
L.A. Times C.	123.4	99.8	729.2	555.0
New York Times Mag. C.	203.9	216.3	1,667.4	1,680.5
Philadelphia Inquirer	36.9	51.6	486.8	487.8
Seattle Times	56.0	70.0	463.0	528.0
St. Louis Post Dispatch	142.1	75.5	661.1	634.8
Washington Post	67.0	57.0	552.0	597.0
Total Group	**931.6**	**872.6**	**7,234.5**	**7,040.3**
% change	**6.8%**		**2.8%**	
■ Weeklies/bi-weeklies				
The Advocate (26X)	148.9	144.8	1,290.4	1,450.9
Army Times Military Group: Air Force Times (52X)	129.3	110.0	1,042.8	1,104.6
Army Times (52X)	125.8	107.5	1,021.3	1,079.6
Navy Times (52X)	133.8	116.4	1,095.0	1,154.9
Capper's (26X)	19.1	20.1	213.9	215.1
Commonweal (22X)	4.3	0.3	52.4	49.1
Golf World (41X) C.	143.8	139.9	1,308.9	1,141.5
Grit (52X)	33.5	19.6	217.5	244.3
Jet (52X) C.	93.0	97.5	681.0	693.0
National Journal (50X) C.	43.2	23.0	353.7	359.3
National Review (25X)	24.8	24.0	262.5	235.6
New Republic (48X)	46.3	21.1	372.1	296.7
New York Mag. (50X) C.	166.0	164.0	1,313.8	1,322.4
New Yorker C.	118.6	126.8	1,021.5	1,019.3
Newsweek (52X) C.	129.9	134.8	1,223.1	1,134.9
People (51X) C.	275.6	232.9	1,936.2	1,921.4
Sporting News (52X) C.	27.4	57.2	284.3	290.0
Sports Illustrated (52X) C.	174.0	209.5	1,458.6	1,387.9
Time (52X) C.	144.4	143.4	1,295.3	1,272.2
TV Guide (52X) C.	143.5	125.7	1,487.0	1,446.5
U.S. News & World Report (50X) C.	171.2	155.8	1,239.7	1,126.1
Total Group	**2,296.3**	**2,174.3**	**19,171.0**	**18,945.3**
% change	**5.6%**		**1.2%**	

NOTES: Linage is given in paid ad pages. (X) represents the number of times published each year; publications are monthly unless otherwise specified. Sectional linage is prorated to circulation of regional editions. A. Frequency change from prior year. B. Incomplete report not included in group total and % change. C. Figures supplied by Publishers Information Bureau. All other figures are supplied by the magazines. PIB adjusts 1991 figures to compare equivalent number of issues to 1992. *Ad Age* makes no attempt to verify figures and is not responsible for inconsistencies or errors. Compiled by Jaime Trapp.